



BadgerCare Plus Tax Filer Information Form Overview

January 8, 2014



Agenda

- Training Purpose
- Entitlement Reform Status Update
- Important Dates
- Upcoming Communications and Trainings
- Updated Informational Mailings
 - Letter 1A & BC+ Tax Filer Information (TFI) Form
 - Letter 3A
- Additional Information About the TFI Form
- Questions
 - Please note that this presentation, including these slides, will be available at dhs.wisconsin.gov/health-care/

Training Purpose

- Provide additional information about the letters and materials that members and applicants are getting in the mail.
- Give you information to help answer the member or applicant's questions or help direct them to the best place to get help.
- **Please note:** ONLY Income Maintenance workers can determine a member or applicant's eligibility for BadgerCare Plus. If in doubt, refer the member or applicant to their local agency to get further assistance.

Entitlement Reform Update

- Governor Walker signed Special Session Assembly Bill 1 into law, delaying BC+ program changes until April 1, 2014.
- CMS approved the delay, with one change:
 - Beginning February 1, 2014, MAGI rules will be applied to all new applicants. As part of this, the new income limit (100% FPL) will be applied to parents and caretaker relatives who are newly applying for BadgerCare Plus.



Entitlement Reform Update - Continued

- As a result of CMS's requirement to apply MAGI rules to all new applicants beginning February 1, 2014, a technical modification is needed to align Wisconsin statutes with CMS requirements.
- DHS is working with the legislature to make this technical modification by the end of January 2014.

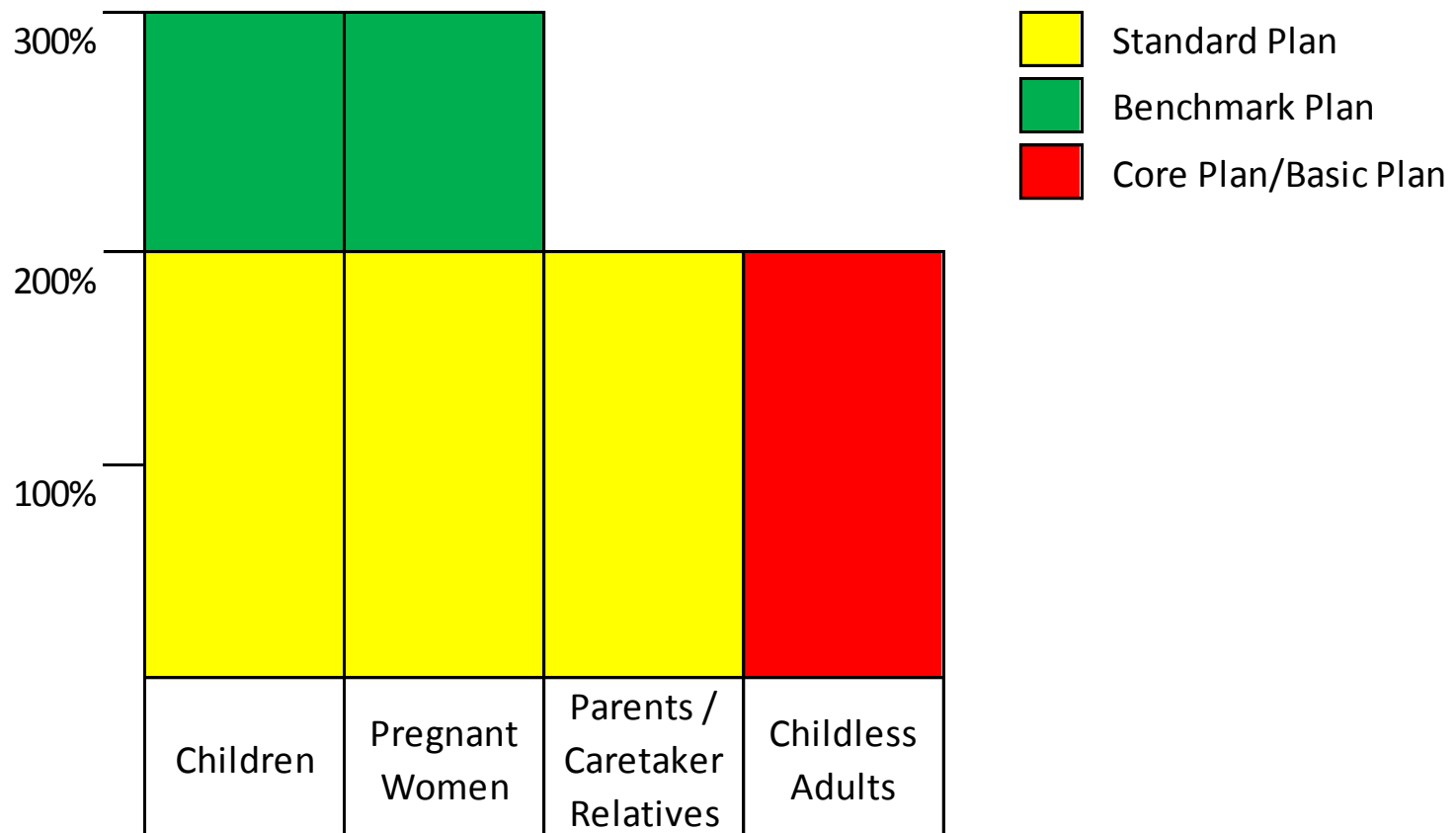
Important Dates

- January 17, 2014: Due date for submitting completed BadgerCare Plus TFI forms.
- February 1, 2014: Implementation of MAGI rules and 100% FPL income limit for BadgerCare Plus parents and caretakers applying for new coverage. (Note that parents and caretakers with incomes from 100% to 200% FPL who are enrolled in BadgerCare Plus as of January 31, 2014 will remain eligible through March 31, 2014, as long as they continue to meet program rules).

Important Dates– Continued

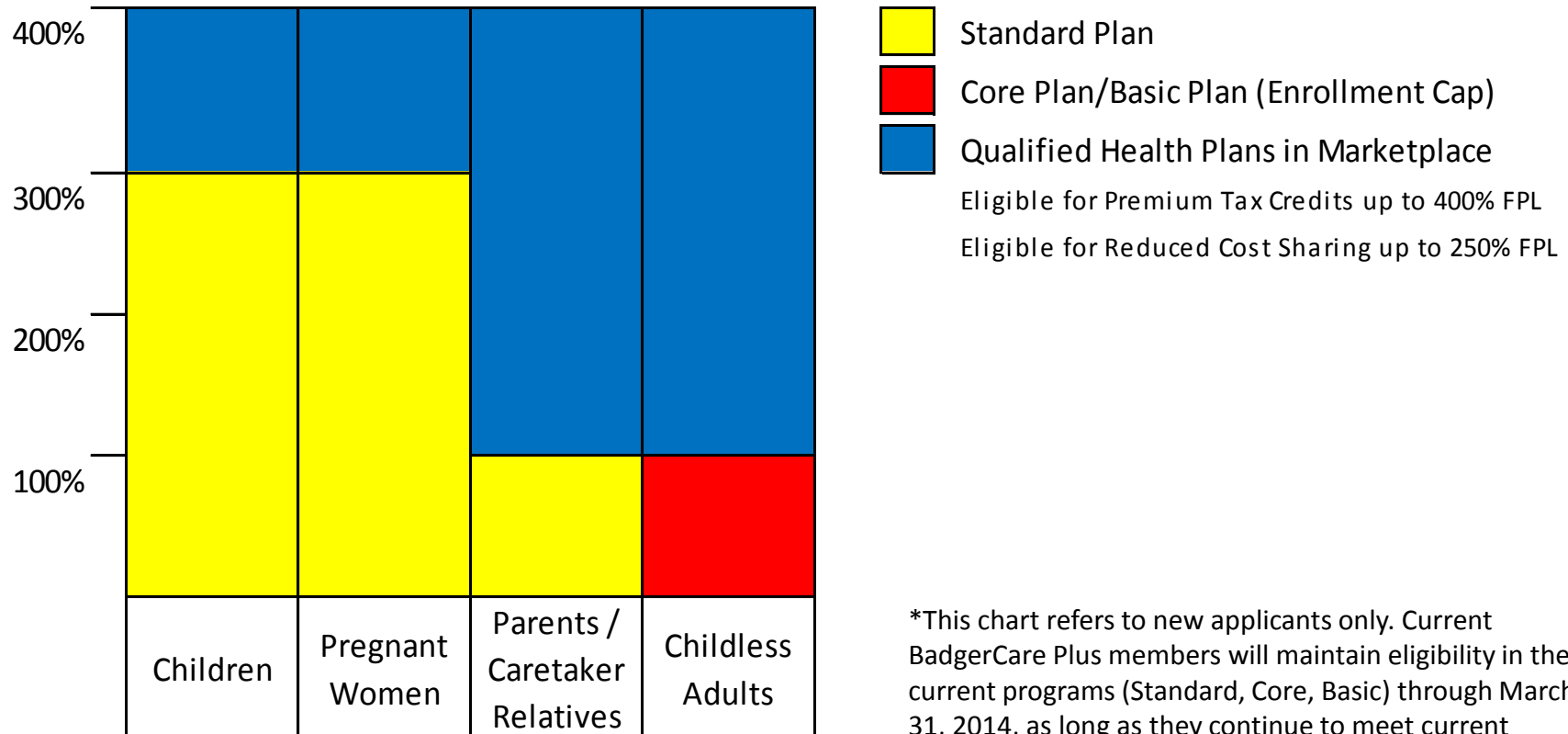
- February 3, 2014:
 - ACCESS.wi.gov will be updated with the new program rules.
 - Adults without dependent children can begin submitting new applications via ACCESS, over the phone, or in person at their local agency. Please note that newly eligible adults without dependent children will begin coverage no earlier than April 1, 2014.
- April 1, 2014: Newly eligible populations begin coverage.

Current BadgerCare Plus Enrollment and Benefits





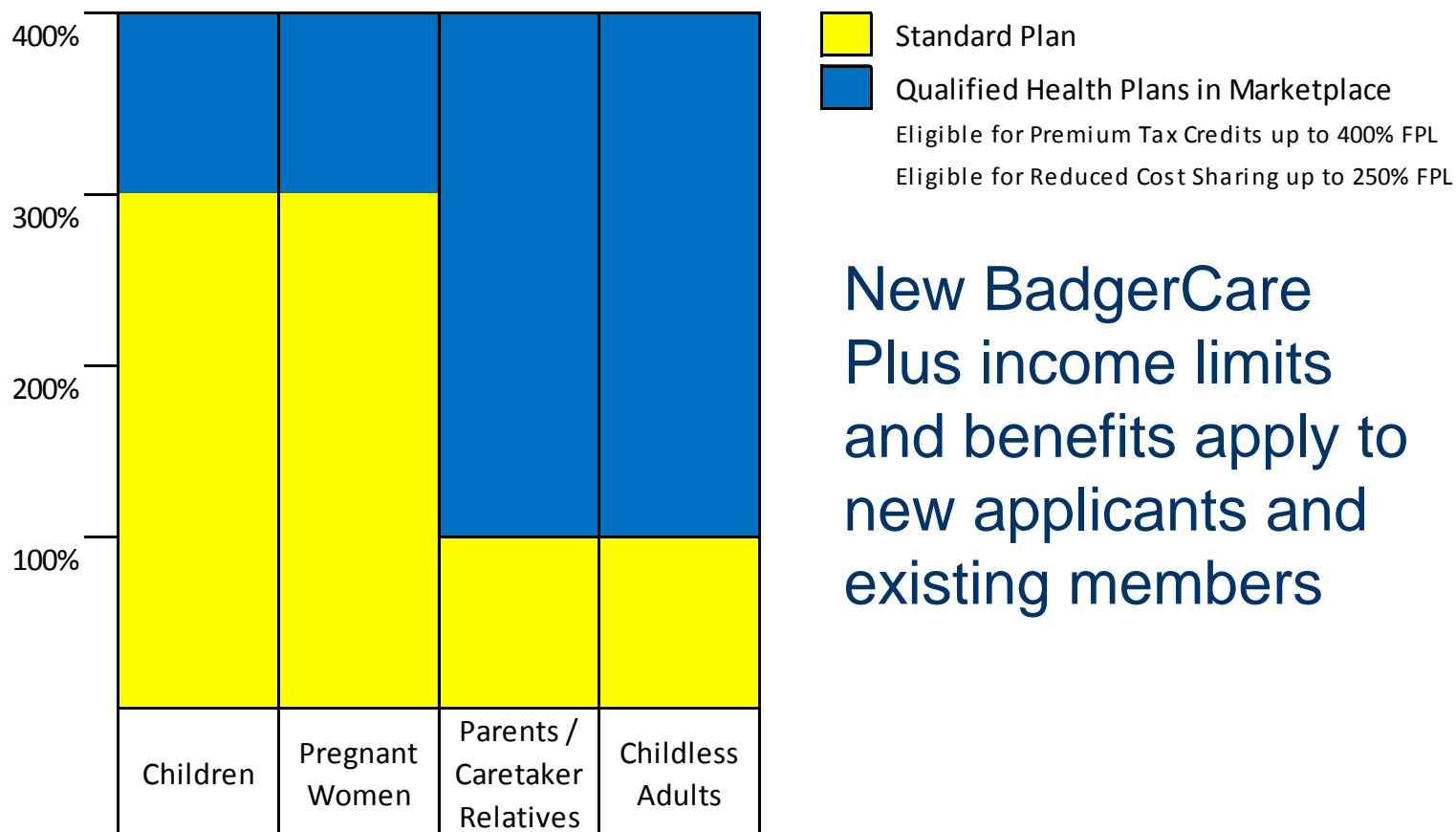
February 1, 2014 BadgerCare Plus & Marketplace Enrollment and Benefits (*New Applicants)



*This chart refers to new applicants only. Current BadgerCare Plus members will maintain eligibility in their current programs (Standard, Core, Basic) through March 31, 2014, as long as they continue to meet current program rules.



April 1, 2014 BadgerCare Plus & Marketplace Enrollment and Benefits



New BadgerCare Plus income limits and benefits apply to new applicants and existing members



Upcoming Communications and Trainings

- A series of statewide in-person partner trainings will be held in late January/early February. Details will be announced soon.
- Continued partner emails when new information or updates become available, including the upcoming trainings.
- Updated FAQ documents.
- Updated member materials.



More Information on BadgerCare Plus Policy Changes

- For more information about the 2014 BadgerCare Plus policy changes, please visit <http://www.dhs.wisconsin.gov/health-care/>
 - Previous web-based trainings, frequently asked question (FAQ) documents and other resources are available at this site.
- The BadgerCare Plus Eligibility Handbook has been updated with the 2014 policy changes; however, many changes will not take effect until April 1, 2014.
 - The BadgerCare Plus Eligibility Handbook is available at <http://www.emhandbooks.wisconsin.gov/bcplus/bcplus.htm>

Protecting and promoting the health and safety of the people of Wisconsin

Updated Informational Mailings

- Letter 1A – this letter informs some current BadgerCare Plus members about the delay in BadgerCare Plus policies. The recipients are:
 - Non-pregnant BadgerCare Plus parents and caretakers with household income over 100% of the Federal Poverty Level (FPL),
 - BadgerCare Plus children with household income over 300% FPL, and
 - BadgerCare Plus Core Plan members with income over 100% FPL.
- **Letter 1A:** includes the Tax Filer Information form for the household to complete.
 - Child support will no longer be counted as income so individual receiving child support are encouraged to fill out this form.
- **Letter 3A:** informs individuals on the BadgerCare Plus Core Plan Waitlist about the delay in new BadgerCare Plus policies.
- Letters 1A and 3A were mailed the week of December 23, 2013.
- Copies of DHS Informational Mailings are available at <http://www.dhs.wisconsin.gov/em/CustomerHelp/bcpleters.htm>



Letter 1A and the “Tax Filer Information” Form

- Letter 1A informs current BadgerCare Plus members affected by the 2014 policy changes that they will continue to receive BadgerCare Plus benefits through March 31, 2014 as long as they continue to meet the current program rules.
- Letter 1A also reminds these BadgerCare Plus members that they need to apply for private health insurance coverage and provides information about the federal Health Insurance Marketplace (also called the Exchange).
- Letter 1A includes an attachment titled “BadgerCare Plus Tax Filer Information”
 - This form is optional and should be completed and returned by **Friday, January 17, 2014.**



Submitting the TFI Form

- If the member lives in Milwaukee County, submit the TFI Form to:
MDPU
PO Box 05676
Milwaukee, WI 53205
Fax: 1-888-409-1979
- If the member DOES NOT live in Milwaukee County, submit the TFI Form to:
CDPU
PO Box 5234
Janesville, WI 53547-5234
Fax: 1-855-293-1822



The Importance of Submitting a Completed TFI Form

- CMS has required the Department to send the TFI form to all BadgerCare Plus members who will be transitioning from BadgerCare Plus to the Marketplace.
- Filling out the TFI Form is optional; however, it allows DHS to test members under new MAGI rules to see if application of MAGI rules results in continued eligibility for BadgerCare Plus after new income limits are applied for April 1, 2014.
- Members who received Letter 1A and a TFI form and choose to fill it out need to return the TFI form by January 17, 2014.



The Importance of Submitting a Completed TFI Form - Continued

- If a member completes the TFI Form and is not able to stay enrolled in BadgerCare Plus under the new program rules, the Department will send the member's information to the Marketplace so their Marketplace application can be completed more easily.
- If a member completes the form and is able to remain enrolled in BadgerCare Plus, they will remain enrolled as long as they continue to meet program rules.



BadgerCare Plus TFI Form – Important Reminders

- ****Please Note****: Only BadgerCare Plus members that receive Letter 1A should complete and submit the TFI.
 - This form is **NOT** an application or renewal for BadgerCare Plus benefits.
- DHS has created an instruction document that provides community partners, providers, and other stakeholders more information about the TFI Form. This document is available at <http://www.dhs.wisconsin.gov/forms/f0/f00914A.pdf>
 - This document provides section-by-section instructions for completing the form.



BadgerCare Plus TFI Form – Sample

WISCONSIN DEPARTMENT OF HEALTH SERVICES

Division of Health Care Access and Accountability

F-00914 (12/13)

TFI

BADGERCARE PLUS TAX FILER INFORMATION

On April 1, 2014, BadgerCare Plus program rules will be changing. These changes include new income limits, new rules for counting household income, and one benefit plan for all members.

These changes only affect BadgerCare Plus members and do not affect people who are enrolled in Medicaid for the Elderly, Blind or Disabled (EBD) or other Medicaid programs.

BadgerCare Plus members whose household income is currently above the new income limits can choose to fill out this form to see if new rules for counting household income will allow people in their household to stay enrolled in BadgerCare Plus after April 1, 2014.

You will see the term “other income” on this form. Other income means income that you receive that isn’t from a job or self-employment, such as Unemployment Insurance, alimony, payments from an annuity, interest payments, payments from property you have sold, etc.

Please Note: You may be asked to provide personally identifiable information or your Social Security Number. Personally identifiable information and Social Security Numbers are used only for the direct administration of the BadgerCare Plus programs.



BadgerCare Plus TFI Form - Features

- The BadgerCare Plus Tax Filer Information (TFI) Form is Form “F-00914 (12/13),” and can be identified by the large “TFI” lettering on the top right corner of each page.
- The TFI Form is four (4) pages long.
- There are four (4) sections included in the TFI Form:
 1. Information About Your Household
 2. Tax Information For Your Household
 3. Information about Children Living In Your Home
 4. Signature
- The TFI Form should be completed and submitted to the CDPU or MDPU by **Friday, January 17, 2014.**



BadgerCare Plus TFI Form – General Instructions

- The TFI form will ask for Social Security Numbers and other personally identifiable information. This information will **ONLY** be used for the administration of the BadgerCare Plus program.
 - Please encourage the member to provide the most complete information as possible.
- When the TFI form refers to “Other Income” please **DO NOT** include:
 - Child Support
 - Supplemental Security Income (SSI)
 - Social Security
 - Veterans Benefits
 - Workers Compensation
- If more space is required for answering the questions in Sections Two and Three, please include additional paper and write the member’s case number on the additional pages (This will be listed on the top of the member’s letter).



TFI Form – Section One

SECTION ONE: INFORMATION ABOUT YOUR HOUSEHOLD

We are asking about how you and the people in your household plan to file taxes because it may affect who is included in your household and how their income is counted. Please answer the following questions:

CARES Case Number (listed at the top of your letter)

Is anyone in your home planning to file a tax return, for income received in 2014?

☐ Yes - Complete Sections Two, Three and Four

☐ No – Complete Sections Three and Four

TFI Form – Section One

- Section 1 asks the member to provide their case number (available at the top right hand corner of Letter 1A).
- This section also asks if anyone in the household plans on filing a tax return for income received in 2014.
 - Note that this question is asking about income received during the 2014 tax year, **NOT** in 2013.
 - The question is referring to tax returns that will be filed in 2015, **NOT** in 2014.
- If no one in the household is planning on filing taxes in 2015 for income they get in 2014, they can skip Section Two.



TFI Form – Section Two

SECTION TWO: TAX INFORMATION FOR YOUR HOUSEHOLD

Each tax filer in your household must fill out Section Two A or B. Please note: if anyone is married and filing a joint tax return, only one spouse needs to fill out Section Two A or B. Use additional paper if there are more than two tax filers in the household.

A. TAX FILER 1	
Name of Tax Filer 1	Name of Spouse (if married and filing jointly)
Tax Filing Status <input type="checkbox"/> Single <input type="checkbox"/> Married Filing Jointly <input type="checkbox"/> Married Filing Separately <input type="checkbox"/> Head of Household	
Will this tax filer be claimed as a dependent by someone outside of the home <input type="checkbox"/> Yes <input type="checkbox"/> No	

Tax Dependents: Answer the questions below for the dependents this tax filer will be claiming on his or her taxes. Include any tax dependents not living with the tax filer. Use an additional sheet of paper if more room is needed.

Name of Tax Dependent	Date of Birth	Social Security Number	Sex <input type="checkbox"/> Male <input type="checkbox"/> Female
Is this dependent expected to have more than \$5,950 in income in 2014 from a job? <input type="checkbox"/> Yes <input type="checkbox"/> No			
Is this dependent expected to have more than \$950 in other income in 2014? (Include any income they get that is NOT from a Job, Self-Employment, Child Support, Social Security, Supplemental Security Income, Workers Compensation or Veterans Benefits.) <input type="checkbox"/> Yes <input type="checkbox"/> No			
Is this tax dependent living outside of the home? <input type="checkbox"/> Yes <input type="checkbox"/> No		Is this tax dependent deceased <input type="checkbox"/> Yes <input type="checkbox"/> No	

TFI Form – Section Two

- Section Two asks about the people in the home who plan on filing a tax return in 2015 for income they get in 2014.
- This section asks about tax filers in the home and their tax filing status.
 - Note that married couples may either “file jointly” or “file separately.” Most married couples file jointly. If the married couple files jointly, be sure to include BOTH married couples’ names in A and they do not have to list the spouse in B.
 - If a tax filer is going to be claimed by someone outside of the home (for example a teenager that plans to file taxes but is claimed by a parent outside the home), note that in this section.
- This section also asks some questions about any tax dependents that the tax filers may have (either living in the home or outside of the home).



TFI Form – Section Three

SECTION THREE: INFORMATION ABOUT CHILDREN LIVING IN YOUR HOUSEHOLD

Answer the questions below for any children under age 19 who are living in the home and who are NOT listed as a tax dependent above. Provide this information even if no one in your home is filing taxes. Use an additional sheet of paper if more room is needed.

Are any children under age 19 living with you?

☐ Yes – Complete the rest of Section Three and Section Four

☐ No – Complete Section Four

Name of Child 1	Date of Birth	Social Security Number	Sex
			<input type="checkbox"/> Male
			<input type="checkbox"/> Female
Is this child expected to have more than \$5,950 in income in 2014 from a job? <input type="checkbox"/> Yes <input type="checkbox"/> No			
Is this child expected to have more than \$950 in other income in 2014? (Include any income they get that is NOT from a Job, Self-Employment, Child Support, Social Security, Supplemental Security Income, Workers Compensation or Veterans Benefits.) <input type="checkbox"/> Yes <input type="checkbox"/> No			

TFI Form – Section Three

- Section Three asks about any children in the home that were NOT included as tax dependents in Section Two.
 - For example, if a tax filer has a child living in the home but is not planning to claim that child as a tax dependent for 2014, or
 - For example, if the parents are divorced a parent only claims the child as a tax dependent every other year.

TFI Form – Section Four

- Section Four collects the member's signature.
- It is very important that only the member, their Authorized Representative, or someone with durable power of attorney signs the TFI form.
- Community partners and other stakeholders can assist the member with completing and submitting the TFI form, but the member must provide the information and physically sign the TFI form.



TFI Form Help and Questions

- If a member has questions or needs more help with filling out the TFI form, they should contact their agency.
- To get the contact information for the member's agency, please visit the agency directory at:
dhs.wisconsin.gov/forwardhealth/imagency/index.htm



Questions?

Don't forget, you can submit questions online at dhshealthcare@wisconsin.gov.*

***Note:** Do not send personal health information or personally identifiable information to this email.